North Carolina COVID-19 Vaccine Management System (CVMS)

Provider Portal

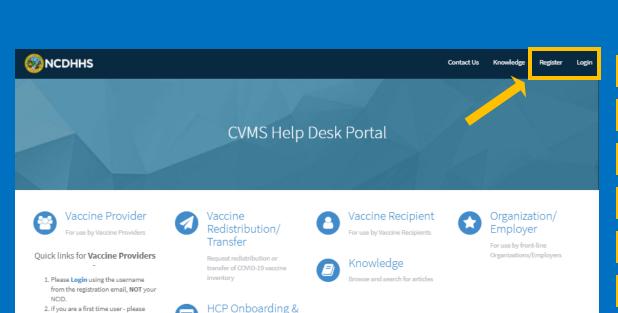
Receiving & Processing Vaccine Shipments User Guide

Version 16

July 1, 2021







Recipient Bulk

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What is the COVID-19 Vaccine Management System (CVMS)?

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If you have any questions, issues or requests, please go to the CVMS Help Desk Portal* at https://ncgov.servicenowservices.com/csm vaccine

You can also call the COVID-19 Vaccine Provider Help Center at (877) 873-6247 and select option 1.

The COVID-19 Vaccine Provider Help Center is available during the following hours:

Monday to Friday: 7 am - 7 pm ET Saturday & Sunday: 10 am - 6 pm ET

* On the home page of the CVMS Help Desk Portal, select Login at the top right-hand corner, then select the "Vaccine Provider" option to submit your question, issue, or request.

Providers that are first time users of the CVMS Help Desk Portal will have to follow the steps below:

- 1. Register for an account on the portal by clicking 'Register' in the top right-hand corner
- 2. Populate your first name, last name, and business e-mail
- 3. You will receive an e-mail with your username and temporary password to log into the portal



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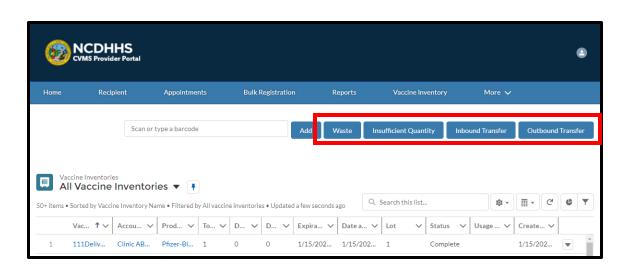
Overview

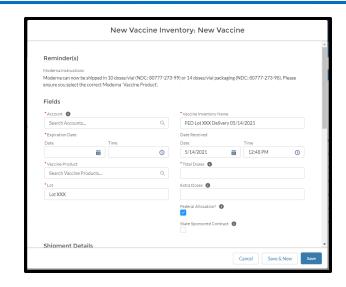


Overview

Receiving and processing COVID-19 vaccine inventory shipments typically involves:

- Reviewing the Vaccine Inventory Shipment Record
- 2. Adding Vaccine Inventory
- 3. Receiving inbound COVID-19 vaccine transfers or redistributions
- 4. Updating the Vaccine Inventory Record
- 5. Marking the Vaccine Inventory Record Complete





The processes included in this training are for users with a **Healthcare Location Manager** profile only.

Additionally, you will need to:

- Use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers
- Log into the CVMS Provider Portal at https://covid-vaccine-provider-portal.ncdhhs.gov

Now, let's get started!



Overview of the COVID-19 Vaccine Inventory Receiving Process



Once a COVID-19 vaccine shipment is on its way, the Primary Vaccine Coordinator will receive an email notification.

From the homepage, click to the Shipments page to **review shipment information**.

A list of shipments will be on the Shipments page.

You will be able to view on this page shipment information, including date shipped, quantity shipped, tracking information, vaccine lot #, NDC #, expiration date, and the manufacturer name.

When you **receive a** COVID-19 vaccine shipment, you will **add the inventory** to your location's overall COVID-19 vaccine inventory.

Navigate to the Vaccine Inventory tab and click add.

Enter all needed details into the prompted fields for the shipped COVID-19 vaccine inventory.

Review and save the inputted information.

Need to make updates to a Vaccine Inventory
Record? You will be able to edit a few fields including
the Extra Doses field and the Vaccine Inventory
Record Name. You will also be able to update the
Vaccine Inventory Status to Complete when there
are no more doses available.

All edits to the Vaccine Inventory Record will be tracked.

If you need support, please submit a ticket through the CVMS Help Desk Portal at https://ncgov.servicenowservices.com/csm_vaccine You can also call the COVID-19 Vaccine Provider Help Center at (877) 873-6247 and select option 1.



Key Terms

Wastage Insufficient Quantity Vaccine Deprecation **Vaccine Inventory Shipment details Extra Doses** Redistribution Transfer

Vaccine Wastage is the sum of COVID-19 vaccines discarded, lost, damaged, or destroyed.

COVID-19 Insufficient Quantity events include any time less than what the CDC considers standard doses per vial for the specific COVID-19 vaccine type is able to be administered to recipients.

Vaccine Deprecation represents the process in which the amount of COVID-19 vaccines are reduced by the amount of COVID-19 vaccines administrated, wasted, lost, or not received.

Vaccine Inventory Shipment Details may include lot number, serial number, and national drug code (NDC).

Extra Doses are any additional doses that are administered beyond what the CDC considers standard doses per vial for the specific COVID-19 vaccine type.

Redistribution is the planned and scheduled movement of inventory between two enrolled sites within the same organization with an approved redistribution agreement.

Transfer is the unplanned and unscheduled movement of inventory between two enrolled sites (move inventory between those who have vaccine to those who do not).



Receiving COVID-19 Vaccine Shipment Notification

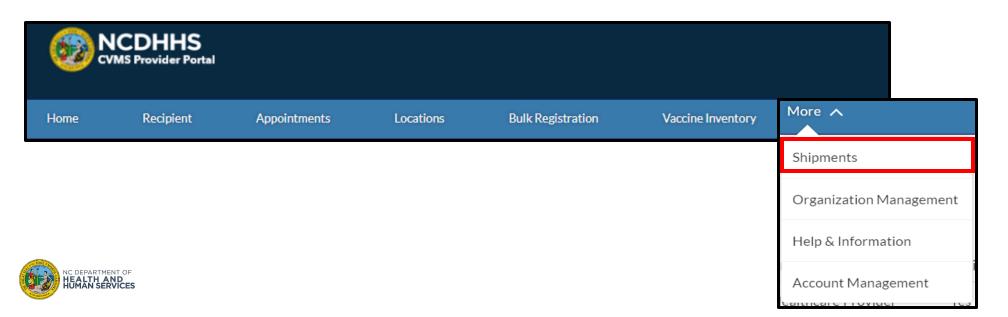


Step 1 of 4: Navigate to Shipments

It is important to maintain accurate COVID-19 vaccine inventory levels for the location(s) that you support to remain in alignment with the CDC's COVID-19 vaccine guidelines. Once a COVID-19 vaccine Inventory shipment is on its way, a **VACCINE SHIPMENT RECORD** will be available for you to review in your **SHIPMENTS TAB**.

The Primary Vaccine Coordinator will also receive an **EMAIL NOTIFICATION** when a **VACCINE INVENTORY SHIPMENT** is on its way to your location.

- 1. At the top of your home page, locate the MORE TAB
- 2. Click SHIPMENTS
- 3. After clicking SHIPMENTS, you will be directed to the SHIPMENTS PAGE



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Tips

The Primary Vaccine
Coordinator will be notified
when a COVID-19 vaccine
shipment is on its way. The
Primary Vaccine Coordinator
was identified by the
Organization Administrator
during the enrollment
process in the CVMS Provider
Enrollment Portal.

NOTE: Shipment information for Federal COVID-19 vaccine allocations to Federal Pharmacy Partners will NOT be provided in CVMS.

Step 2 of 4: Switch Shipment Record List Views

You will see a **LIST VIEW** on your page. A list view is a **SUMMARY OF YOUR RECORDS**. By default, you may be directed to the Recently Viewed list view. To see all your Shipment Records, you will have to switch to the 'All Shipment' records list view. You will be able to switch back and forth between list views.

- 1. Click the **DROP-DOWN MENU** next to the list view name
- 2. Click ALL SHIPMENTS
- 3. If you want to make your selection your default list view, click the **THUMBNAIL ICON**



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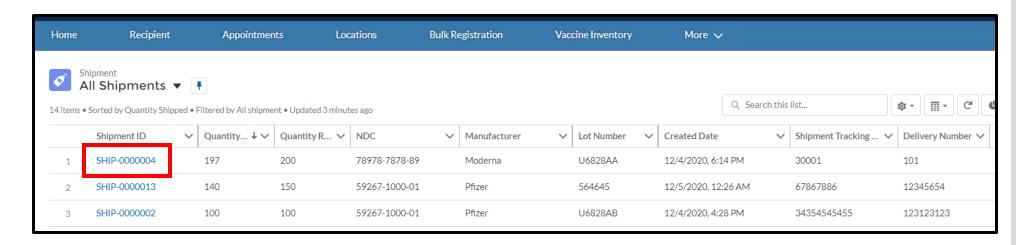
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Step 3 of 4: Navigate to the Shipment Record

On this page, you will see a list of Vaccine Shipment records for the location(s) you support. The **VACCINE SHIPMENT RECORD** will be **RELATED** to an **ORDER RECORD**. This means that your Vaccine Shipment record will always be associated to a specific order.

- 1. Locate the SHIPMENT ID
- 2. Click the **SHIPMENT ID HYPERLINK**
- 3. You will be directed to the VACCINE SHIPMENT RECORD



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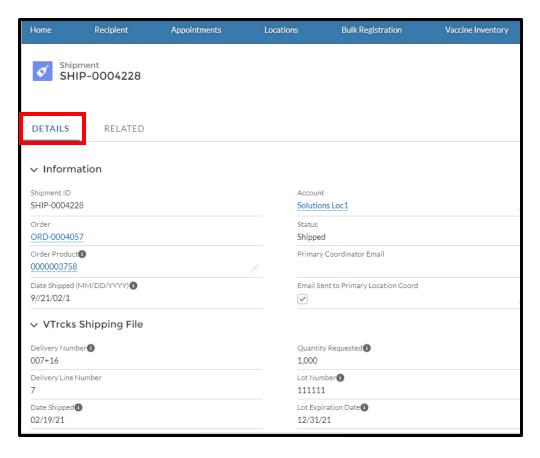
Tips

You can use the SEARCH BAR to search for a record. Clicking on column header will sort by the column.

For example, you may choose to sort by SHIPMENT DATE.



Step 4 of 4: Navigate to the Shipment Details



On the Shipment record, you will be able to **REVIEW DETAILS** about your expected order including:

- Date Shipped
- Quantity Shipped
- Tracking Information
- Lot #
- NDC #
- Expiration Date
- Manufacturer
- 1. On the Shipment record, click on the **DETAILS TAB**

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Tips

Review specific details about your order.



COVID-19 Vaccine Shipment Email Notification

Primary Vaccine Coordinators will be notified via **EMAIL** if a **VACCINE SHIPMENT** has been processed for location(s) they support. You can expect the email to come from the **CVMS Support Team**.

The Primary Vaccine Coordinator will receive an email notification for each shipment **BY VACCINE TYPE**. Details in the email will include:

- Date Shipped
- Quantity Shipped
- Manufacturer
- NDC Number
- Lot Number
- ExIS Order Number
- Carrier
- Shipment Tracking Number

Note: Email will come from nccvms@dhhs.nc.gov

Hello John Smith,

Please see below for details of a COVID-19 vaccine shipment that is on its way to your location.

Vaccine Details:

Date Shipped: 02/01/2021
Quantity Shipped: 300
Manufacturer: Moderna TX

NDC: 80777-0273-99
 Lot Number: 032L20A

ExiS Order ID: FLU920001FC01302021

Shipment Tracking Information:

Carrier: UPS1

Shipment Tracking Number: 1Z126W010100941170

Need support? Submit your question to the help desk here: https://ncgov.servicenowservices.com/csm_vaccine

Thank you, NC Department of Health and Human Services

Division of Public Health





Adding COVID-19 Vaccine Inventory

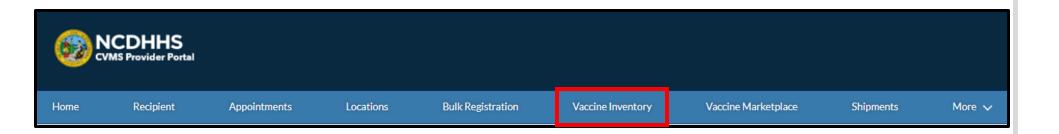


Step 1 of 7: Navigate to the Vaccine Inventory tab

When you **PHYSICALLY RECEIVE** a COVID-19 vaccine inventory shipment for any COVID-19 vaccine type, you will want to **ADD THE INVENTORY** to your location's overall COVID-19 vaccine inventory. Processing your COVID-19 vaccine shipments correctly will ensure that your COVID-19 vaccine levels are accurate for your reporting.

This process **DOES NOT** include processing inbound COVID-19 vaccine inventory transfers or redistributions. Please see the Receiving a COVID-19 Vaccine Transfer / Redistribution section for steps on how to process inbound transfers or redistributions.

- At the top of your home page, locate the tab VACCINE INVENTORY
- 2. Click **VACCINE INVENTORY**
- 3. After clicking **VACCINE INVENTORY**, you will be directed to the **VACCINE INVENTORY TAB**



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Tips

NOTE: Federal COVID-19 vaccine allocations to Federal Pharmacy Partners are NOT tracked or managed in CVMS.



Step 2 of 7: Create a New Vaccine Inventory Record

At the top of the page, you will see the different actions you can take to manage your COVID-19 vaccine inventory. This will be your main working page for ensuring that your inventory levels are accurate. See the CVMS PROVIDER PORTAL INVENTORY DEPRECATION, TRANSFER, AND REDISTRIBUTION USER GUIDE at CVMS User Guides, Recorded Trainings and Upcoming Trainings | NC DHHS COVID-19 to learn more about COVID-19 vaccine Wastage, Insufficient Quantities, and Redistribution / Transfer processes.

- 1. Click ADD
- 2. After clicking add, you will be prompted to **PROVIDE ADDITIONAL VACCINE DETAILS**



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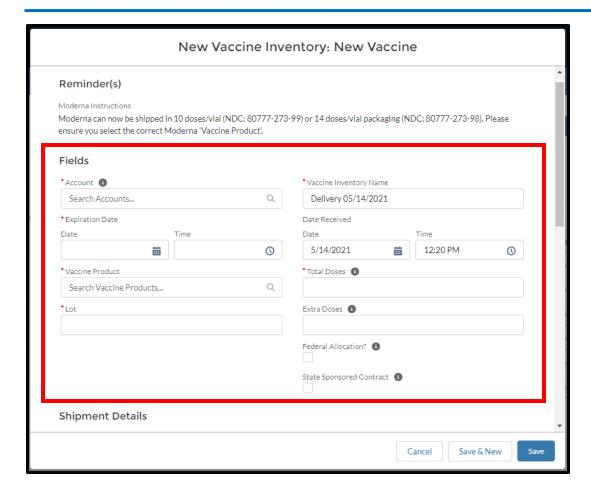
Tips

By Default, the view is set as "Recently Viewed", therefore the list will seem empty at first.

Change the view to "All Vaccine Inventories" and click the THUMBNAIL icon to PIN your favorite list view.



Step 3 of 7: Enter Vaccine Inventory Information



For more information on Extra Doses, see page 'Entering Extra Doses'.

The **NEW VACCINE INVENTORY PAGE** will appear.

To search for a picklist value, you need to enter at least **THREE CHARACTERS.**

1. Populate all required **VACCINE INVENTORY FIELDS**

- Account (Do not create a new Account)
- Vaccine Inventory Name (editable)
- Expiration Date
- Date and Time Received
- Vaccine Product
- Total Doses
- Lot #
- Federal Allocation?
- State Sponsored Contract
- 2. Continue to SHIPMENT DETAILS

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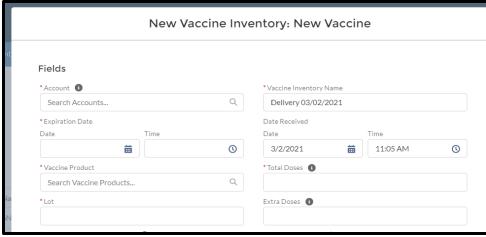
Tips

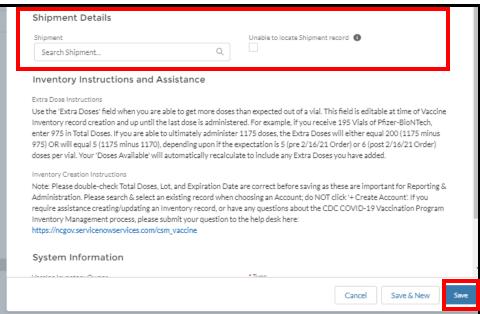
When adding Inventory into CVMS, we recommend including the Lot #'s in the Inventory Name to help staff that are administering vaccines to recipients to more easily choose the correct Inventory record.

Shipments from
DIFFERENT LOT NUMBERS
must be entered as
separate Inventory
records.



Step 4 of 7: Enter Shipment Details





You can now enter the remaining Vaccine Shipment record details.

Do **NOT** reduce the **TOTAL DOSES AMOUNT** if you have wastage or plan to redistribute inventory.

This process **MUST** be recorded separately as **INVENTORY DEPRECATION**.

- 1. Select a **SHIPMENT RECORD**
- If you cannot locate the Shipment record,
 CHECK the UNABLE TO LOCATE SHIPMENT RECORD box
- 3. Before saving, **REVIEW** all entered details
- 4. Click **SAVE**

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Tips

You may click SAVE & NEW to process / add additional Vaccine Inventory records.

Vaccine Pfizer products
Ordered on or after
January 26 should be
logged as the 6 doses/vial
Pfizer product (not 5) so
that inventory is being
tracked per more recent
guidance from the CDC.
Vaccine Pfizer products
Ordered before January 26
should be logged as the 5
doses/vial Pfizer product.

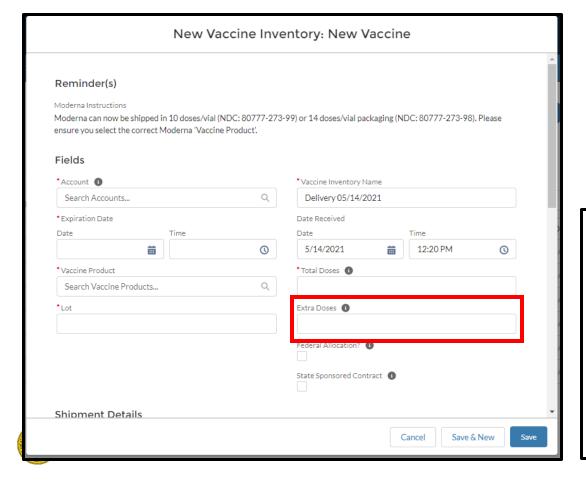


Step 5 of 7: Entering Extra Doses

If you know you will have extra doses, you can update the **EXTRA DOSES** field. You will be able to update this field later to reflect the actual number of extra doses administered.

For an example on when to record **EXTRA DOSES**, please see the **INVENTORY INSTRUCTIONS AND ASSISTANCE** image below.

Note: Entering in Extra Doses is not a required field.



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Tips

The Extra Doses field is editable at time of Vaccine Inventory record creation and up until the last dose is administered.

Inventory Instructions and Assistance

Extra Dose Instructions

Use the 'Extra Doses' field when you are able to get more doses than expected out of a vial. This field is editable at time of Vaccine Inventory record creation and up until the last dose is administered. For example, if you receive 195 Vials of Pfizer-BioNTech, enter 975 in Total Doses. If you are able to ultimately administer 1175 doses, the Extra Doses will either equal 200 (1175 minus 975) OR will equal 5 (1175 minus 1170), depending upon if the expectation is 5 (pre 2/16/21 Order) or 6 (post 2/16/21 Order) doses per vial. Your 'Doses Available' will automatically recalculate to include any Extra Doses you have added.

Inventory Creation Instructions

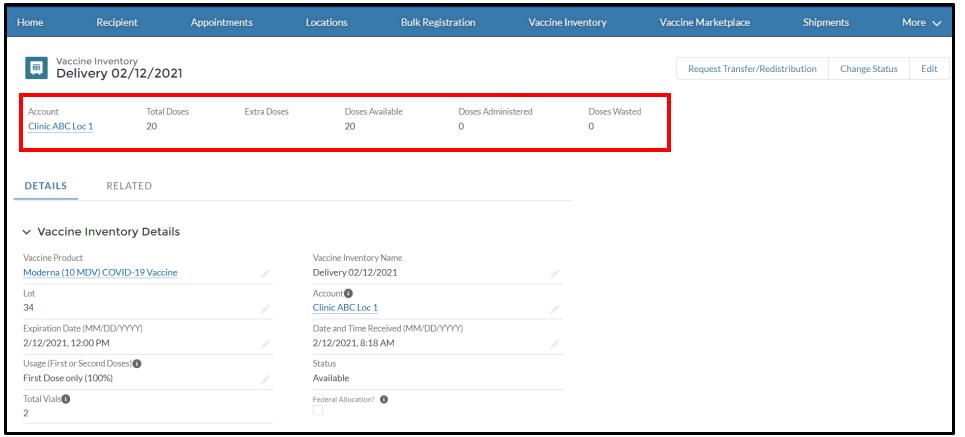
Note: Please double-check Total Doses, Lot, and Expiration Date are correct before saving as these are important for Reporting & Administration. Please search & select an existing record when choosing an Account; do NOT click '+ Create Account'. If you require assistance creating/updating an Inventory record, or have any questions about the CDC COVID-19 Vaccination Program Inventory Management process, please submit your question to the help desk here:

https://ncgov.servicenowservices.com/csm_vaccine

Step 6 of 7: Review the Vaccine Inventory Record

After clicking save, you will be directed to the **VACCINE INVENTORY RECORD**. Your total COVID-19 vaccine inventory has now been updated to reflect this additional inventory.

At the top of the record, your **VACCINE INVENTORY HIGHLIGHT PANEL** will reflect ongoing **DOSAGE ACTIVITY** for this inventory.



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Tips

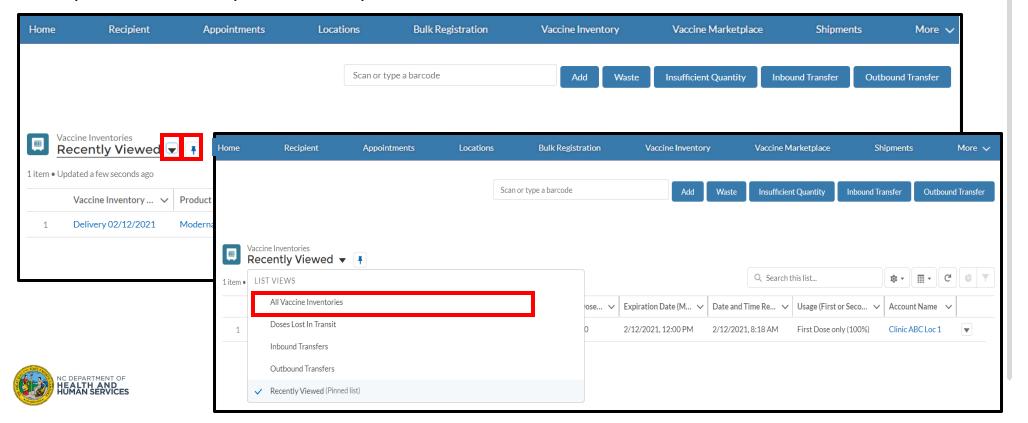
Review the Highlight Panel at the top of the Vaccine Inventory Record.



Step 7 of 7: Switch Inventory List Views

You will see a **LIST VIEW** on the vaccine inventory page. A list view is a **SUMMARY OF YOUR RECORDS**. By default, you may be directed to the Recently Viewed List View. To see all your Inventory Records, you will have to switch to the All Vaccine Inventory Records list view. You will be able to switch back and forth between list views.

- 1. Click the **DROP-DOWN MENU** next to the list view name
- 2. Click ALL VACCINE INVENTORIES
- 3. If you want to make your selection your default list view, click the THUMBNAIL ICON



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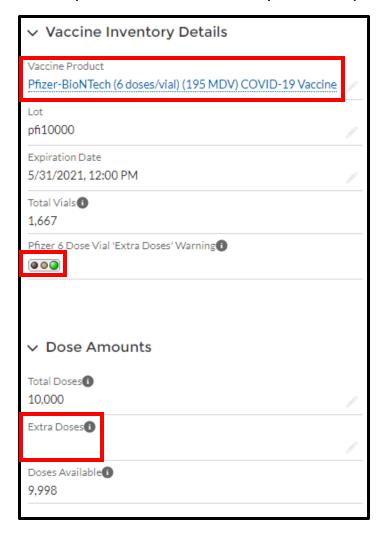
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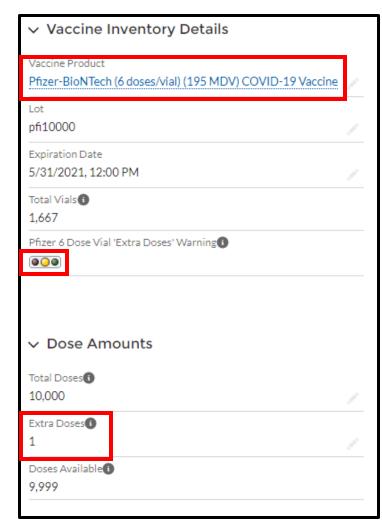
Tips

Click the THUMBNAIL icon to PIN your favorite list view.

Special attention to the Pfizer 6-dose vial control

Due to the nature of the Pfizer 6-dose vial, extra doses are not allowed by the CDC. Though CVMS will still allow you to enter an extra dose for any vaccine inventory, you will receive a yellow traffic light visual alert for any Pfizer 6-dose product inventories if you attempt to add extra doses.





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Tips

If extra doses were previously annotated, do not try to remove them. All extra doses and wastage events should be entered at the time of the event.



Declaring Vaccine Allocation Availability

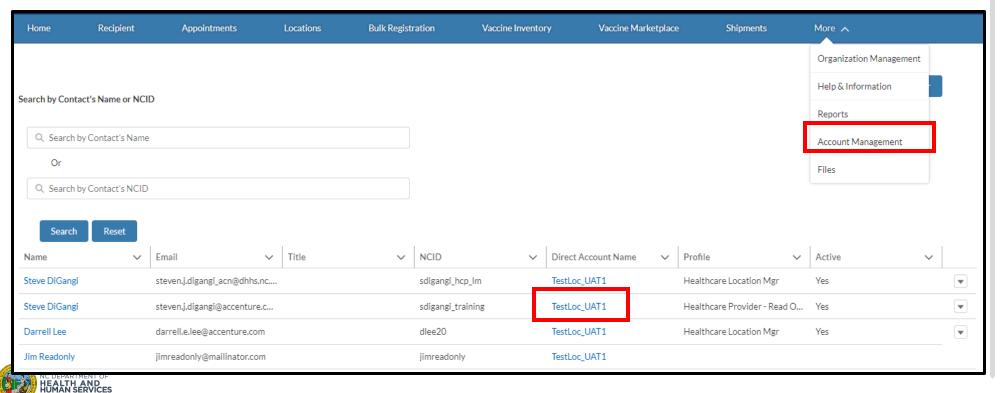


Step 1 of 2: Navigate to the Account Record (Location)

You will be able to adjust your availability to receive COVID-19 vaccine inventory each week for your location in the CVMS Provider Portal. It is important that you **UPDATE YOUR AVAILABILITY BY MONDAY AT 10:00 AM EACH WEEK** if you want your adjustment to be considered for vaccine allocation planning.

If you indicate **YES**, that means your location is able to receive COVID-19 vaccine inventory that week if allocated. If you indicate **NO** because you do not have storage or capacity, your location will not be allocated COVID-19 vaccine inventory until you update your preference.

1. From the Account Management tab, click the ACCOUNT NAME (LOCATION)



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Tips

If you have multiple locations, make sure to update each location's Allocation Availability each week as appropriate.

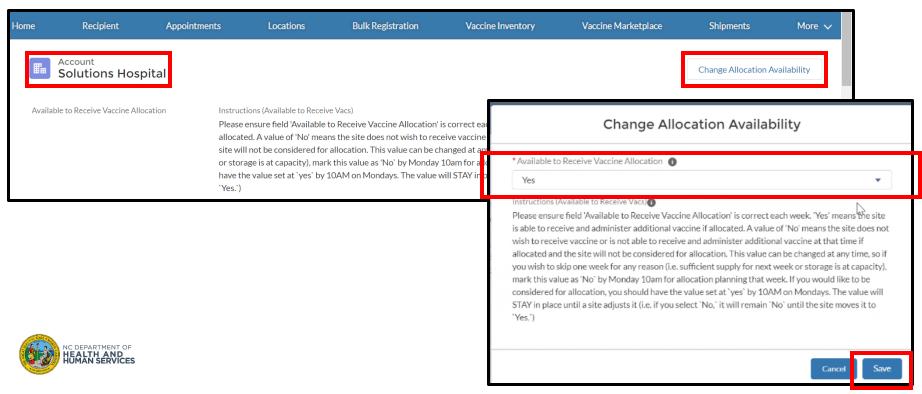
You can also get to the Account Record (Location) from the Vaccine Inventory tab and clicking on the Account Name (Location) field from any row of vaccine inventory records.

Step 2 of 2: Update Your Location's Availability to Receive COVID-19 Vaccine Inventory

From your Account (Location) Record, you can use the **CHANGE ALLOCATION AVAILABILITY** button to certify that your location is able to receive and administer additional vaccine if allocated. This **VALUE DOES NOT RESET OR AUTOMATICALLY UPDATE EACH WEEK.** It will remain the same as the last updated value until you change it.

Your location's **ALLOCATION AVAILABILITY STATUS** is defaulted to **YES** upon registration.

- 1. From the Account Record (Location), click the CHANGE ALLOCATION AVAILABILITY button
- 2. Select YES or NO from the drop-down menu
- 3. Click SAVE



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Tips

Once you select Yes or No for a location, this selection will remain until you change it.

Receiving a COVID-19 Vaccine Transfer / Redistribution

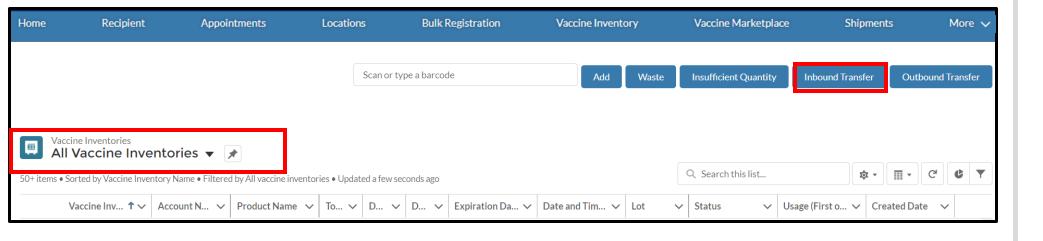


Step 1 of 4: Processing an Inbound Transfer

If you are **RECEIVING** an **INBOUND TRANSFER** / **REDISTIBUTION** from another location, you will want to review the inbound transfer page to stay up-to-date. When you receive the inbound transfer / redistribution, you will be able to **PROCESS THE INVENTORY** via the **INBOUND TRANSFER PAGE**.

You **DO NOT** process inbound transfers / redistributions from the **ADD INVENTORY PROCESS**.

- From the home page, click VACCINE INVENTORY
- Click INBOUND TRANSFER



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Tips

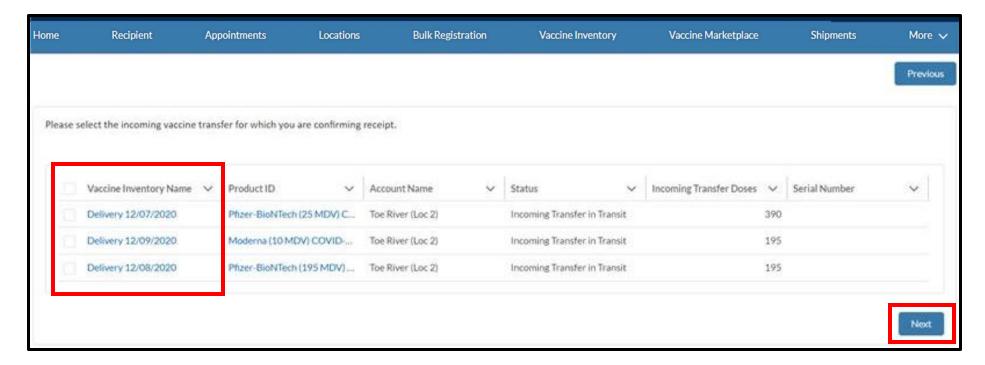
Inbound transfers / redistributions are not processed from the Add Inventory Process.



Step 2 of 4: Select the Vaccine Inventory Record

On the **INBOUND TRANSFER PAGE**, you will see **VACCINE INVENTORY** records that are incoming transfers / redistributions to your location. You will be able to select the inbound transfer you are ready to process and add it to your inventory.

- Select the correct VACCINE INVENTORY record
- 2. Click NEXT





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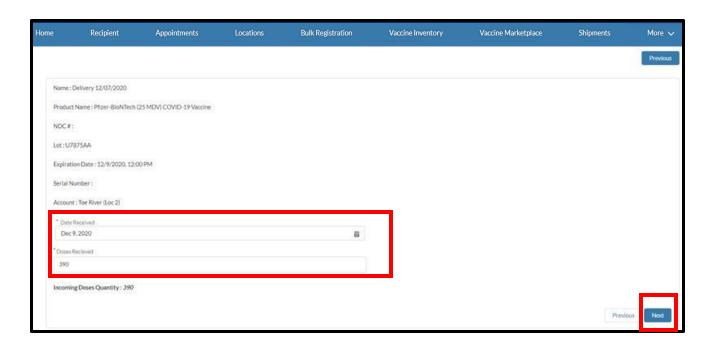


Step 3 of 4: Complete the Inbound Transfer form

Once you select the correct Vaccine Inventory record, you will see the Vaccine Inventory record details pre-populated. You will want to provide the **DOSES RECEIVED** and **DATE RECEIVED**.

After clicking next, your inventory levels will update, and the inbound transfer / redistribution is now processed.

- 1. Enter the **DATE RECEIVED**
- 2. Enter the **DOSES RECEIVED**
- 3. Click **NEXT**



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Tips

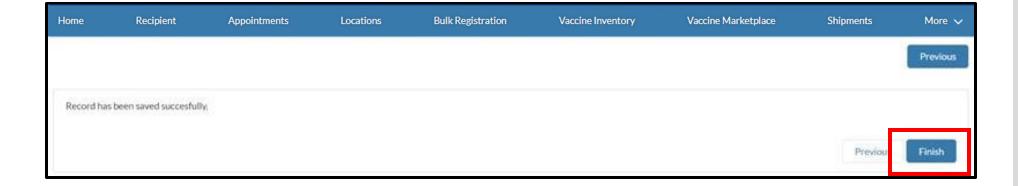
Identify doses received and date received for the Vaccine Inventory.



Step 4 of 4: Complete the Inbound Transfer

After clicking next, your inbound transfer / redistribution is processed and added to your inventory.

1. Click **FINISH**



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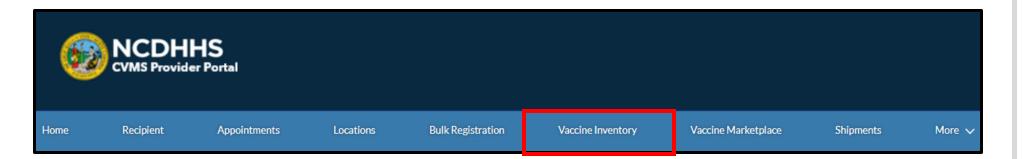


Updating Vaccine Inventory Record Details



Step 1 of 3: Navigate to the Vaccine Inventory tab

- 1. At the top of your home page, locate the **VACCINE INVENTORY** tab
- 2. Click VACCINE INVENTORY
- 3. After clicking **VACCINE INVENTORY**, you will be directed to the **VACCINE INVENTORY** list view



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Tips

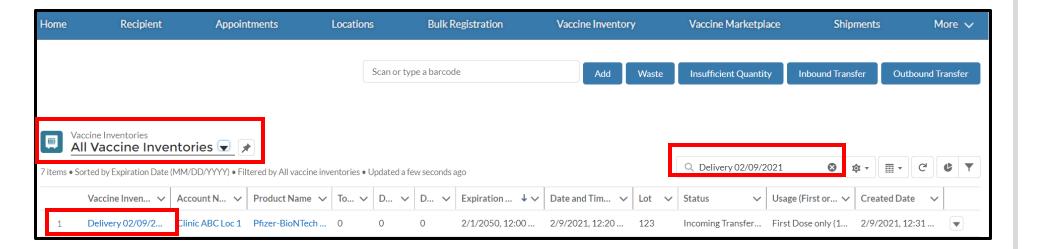
NOTE: Federal COVID-19 vaccine allocations to Federal Pharmacy Partners are NOT tracked or managed in CVMS.



Step 2 of 3: Navigate to Vaccine Inventory Record

Use the All Vaccine Inventories List View to locate the specific record you need to update. You can **SEARCH or SORT** in the list view.

- 1. Identify the VACCINE INVENTORY RECORD that you wish to update
- 2. Click the **VACCINE INVENTORY NAME HYPERLINK**

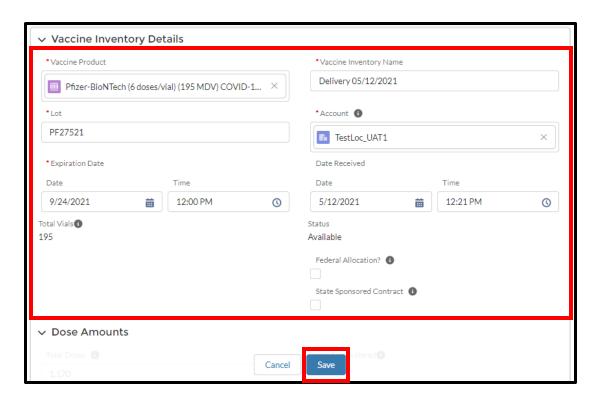


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Step 3 of 3: Update the Vaccine Inventory Record



Before you edit, make sure you are on the appropriate record.

Remember, you must always save your changes.

- Click the **EDIT BUTTON** on the right-hand side
- Locate the field you want to make changes to
- 3. Update the field
- 4. Click SAVE
- If the field does not update, click REFRESH and try again

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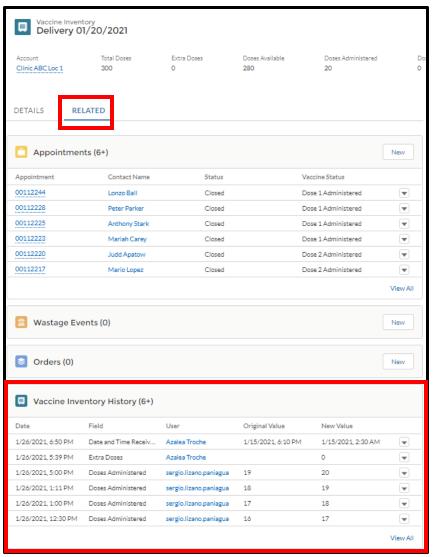
Tips

Vaccine Inventory Status can be edited by Completing the Vaccine Inventory (Review next section).

If additional doses of the Vaccine Inventory are identified, use the Extra Doses field to edit that Inventory directly.



Reviewing Vaccine Inventory History



All changes and edits made to the Vaccine Inventory Record are captured within the CVMS Provider Portal in the Vaccine Inventory History.

- 1. From the Vaccine Inventory Record, click on the **RELATED** tab.
- Scroll down to VACCINE INVENTORY HISTORY
- 3. Review all Vaccine Inventory History

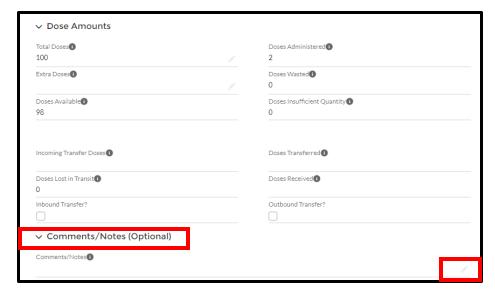
Click View All to look at all the Vaccine Inventory History changes made to the record.

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Adding Comments/Notes to a Vaccine Inventory Record

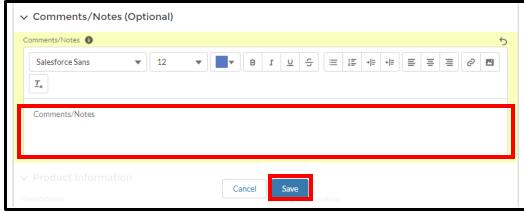


Any comments/notes related to the Vaccine Inventory record can be captured in the **COMMENTS/NOTES** field.

- 1. From the Vaccine Inventory Record, scroll down to the **COMMENTS/NOTES (OPTIONAL) SECTION**
- 2. Click the pencil icon to edit
- 3. Add any comments/notes in the free text field and click **SAVE**



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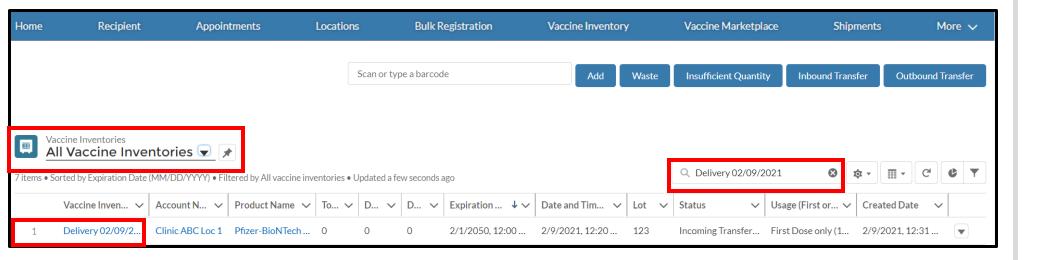
Marking a Vaccine Inventory as Complete or Reserved for Future Use



Step 1 of 3: Navigate to Vaccine Inventory Record

When a Vaccine Inventory record has zero available dose left, and no extra dose can be extracted from the vials, you will be able to update the Vaccine Inventory record status as Complete. This will help the NCDHHS allocation team to identify which Vaccine Inventory records do not have any remaining doses to be administered.

- 1. From the **VACCINE INVENTORY TAB**, identify the **VACCINE INVENTORY RECORD** that you wish to update
- Click the VACCINE INVENTORY NAME HYPERLINK

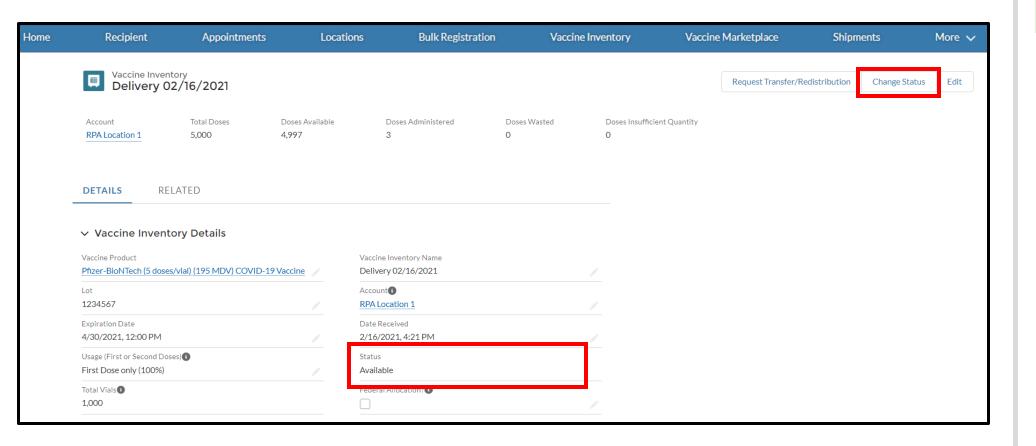


Audience



Step 2 of 3: Click the Change Status Button

- 1. At the top of the Vaccine Inventory page, locate the **CHANGE STATUS** button
- 2. Click the **CHANGE STATUS** button



Audience



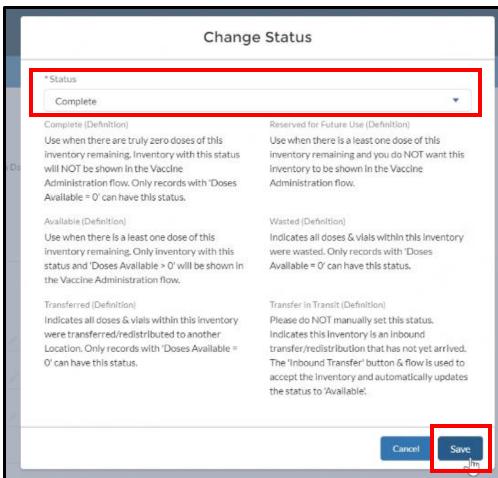
Step 3 of 3: Select the Complete Status & Save

You will be prompted to update the **STATUS**. Once you save your changes, the Vaccine Inventory status will update accordingly. Definitions for each status are provided on this screen to ensure you select the appropriate **STATUS**.

1. Select the appropriate **STATUS**

- Complete
- Reserved for Future Use
- Available
- Transferred
- Wasted
- Incoming Transfer in Transit

2. Click **SAVE**



Audience

Healthcare Location Manager

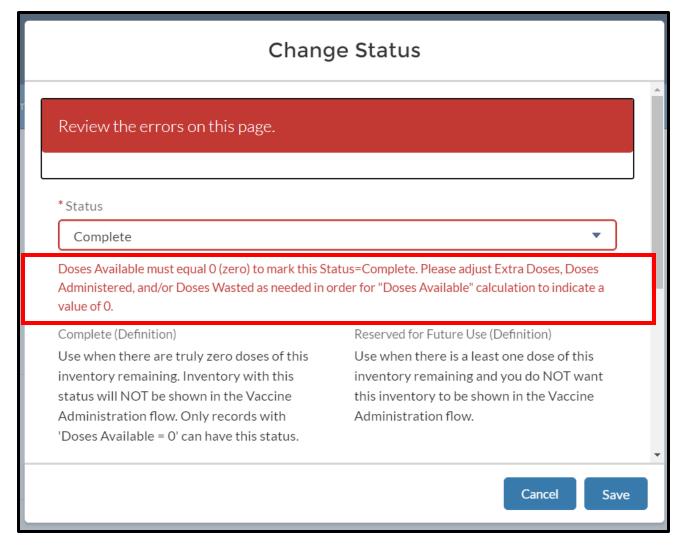
Tips

Use this feature to update the Vaccine Inventory status to Complete when you have zero doses available.



Failed Complete Status Update

The alert screen below will be displayed if your doses available does not equal 0. You will be unable to update the Vaccine Inventory Status to Complete until the appropriate adjustments are made to your Vaccine Inventory. Once resolved, you can go back and Complete the Vaccine Inventory Status.

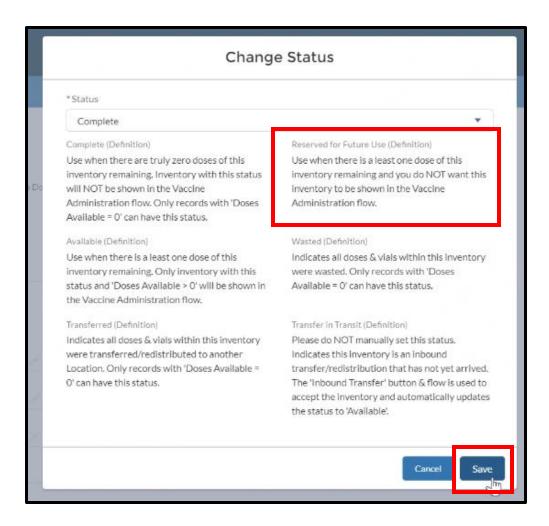






Reserved for Future Use Status

Putting a Vaccine Inventory Record in the **RESERVED FOR FUTURE USE** status will remove it from being displayed on the vaccination administration screen for Healthcare Providers to select when vaccinating recipients.



Audience

Healthcare Location Manager

Tips

This status may be helpful to flag Inventory Records at a location that should not be selected by Healthcare Providers when vaccinating recipients (e.g., reserved for second dose, reserved for upcoming mass vaccination clinic, flagged for transfer or redistribution).



Receiving Federally Allocated Vaccine Inventory (FEMA and FQHC only)



Receiving Inventory from Federal Allocation Overview

A **federally allocated vaccine inventory** means that the vaccine inventory shipment was sent on behalf of the Federal Government.

- **State Allocations**: If the inventory is sent on behalf of the State, your primary Vaccine Coordinator should have been sent an email and a shipment record should be available in the CVMS Provider Portal.
- **Federal Allocations**: If the inventory is sent on behalf of the Federal Government, there will **NOT** be a shipment record in the CVMS Provider Portal, and you should follow the steps below to mark the inventory as Federal Allocation in the CVMS Provider Portal.

This process is designed primarily for FEMA and FQHC designated locations. Non-FEMA/FQHC Provider that also receive Vaccine Inventory from 'Federal Allocation' should also mark those inventories. If the option to mark the inventory is not available, please contact the CVMS Help Desk (instructions on slide 2).

NOTE: Federal COVID-19 vaccine allocations to Federal Pharmacy Partners are NOT tracked or managed in CVMS.

Audience

Healthcare Location Manager

Tips

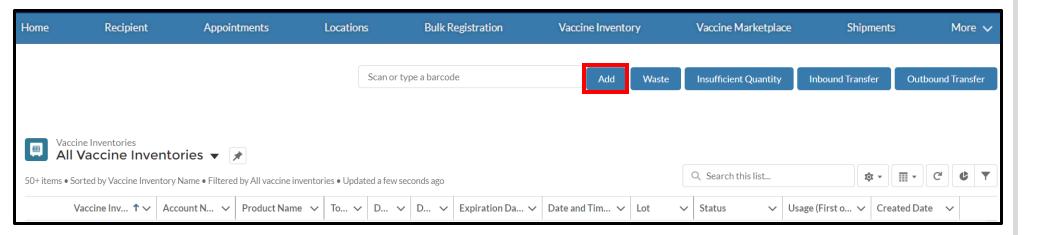
Before you receive a
Federal Allocation, ensure
the read only field **Able to Receive Federal Allocations?** checkbox is
checked on your account
record.



Step 1 of 2: Navigate to the Vaccine Inventory Tab

To declare a new Vaccine Inventory record as a **Federal Allocation**:

1. Click **ADD** from the Vaccine Inventory Tab



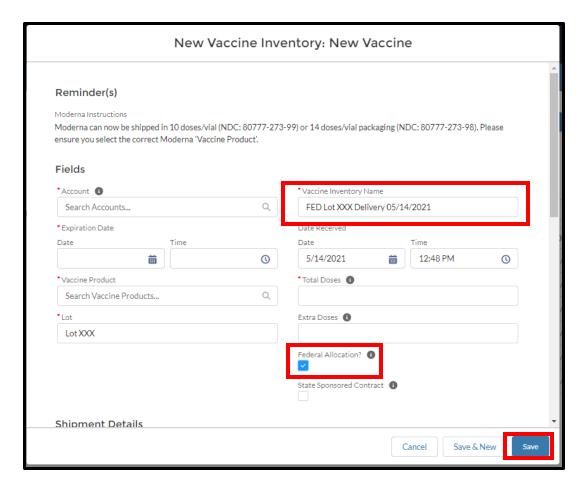
Audience



Step 2 of 2: Complete New Vaccine Inventory Record Form

- 1. Populate all required **VACCINE INVENTORY FIELDS**
- 2. Add the label **FED** to the beginning of the *Vaccine Inventory name* so that it is easily identifiable.

 *Note: This is a required labeling standard for ALL Federal Allocations (e.g., "FED Delivery")
- Check the FEDERAL ALLOCATION? Checkbox
- Click SAVE



Audience

Healthcare Location Manager

Tips

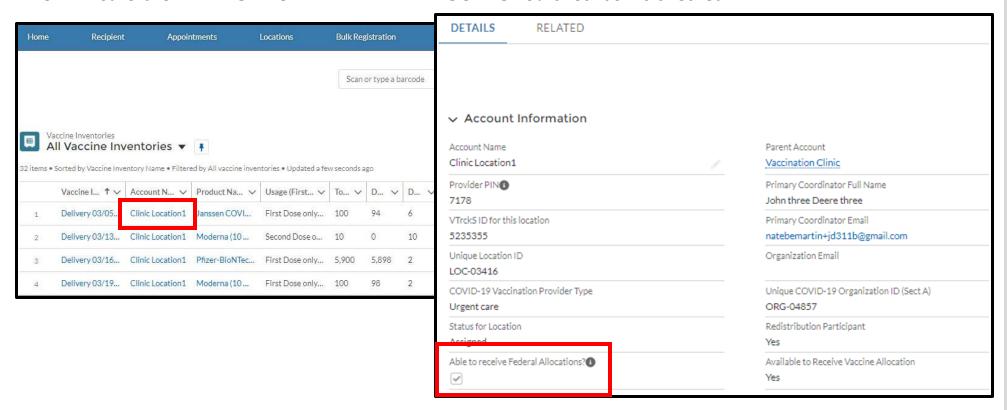
Remember that it is a best practice to always add the LOT NUMBER to all vaccine inventory names.



How to Check if your Location is Set to Receive Federal Allocations

If you are unable to check the **FEDERAL ALLOCATION?** Checkbox from the vaccine inventory record, you may want to check if the **ABLE TO RECEIVE FEDERAL ALLOCATIONS?** checkbox is checked on your Account record.

- Navigate to the VACCINE INVENTORY tab
- 2. Click on the Account Record associated with the receiving location
- 3. Ensure the ABLE TO RECEIVE FEDERAL ALLOCATIONS? checkbox is checked



Audience

Healthcare Location Manager

Tips

will not be able to check the Federal Allocations check box on the Vaccine Inventory record. In the meantime, you can add "FED -" to the VACCINE INVENTORY NAME to communicate that it is a Federal Allocation.

To receive the Federal Allocation checkbox functionality, contact the CVMS Help Desk at https://ncgov.servicenows ervices.com/csm vaccine.



Appendix



Additional Notes

Key Items:

- Hyperlinks appear as light blue and will provide additional information or navigation.
- * Asterisks are used to denote required information.
- A Toggle can be clicked to see selectable options.
- A Pen can be clicked to make edits to the field.
- Previous Navigation Buttons can be clicked on to progress to the "next" or the "previous" step in a task.
- Pause Dutton can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

Supported Web Browsers:

- Please use the latest version of Chrome, Firefox, Safari, or Edge browsers to access CVMS.
- For more information on supported browsers, see https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5
- Note: Internet Explorer and Edge (non-Chromium) browsers are not supported.



User Guide Change Log

Version	Date of Change	Changes Made	Author
1	12/10/2020	Original version	Azalea Troche
2	12/21/2020	 12: Updated shipment email notification 10,20-22: New slides on List Views and Account (Location) Record 	Nicholas Rinz
3	12/31/2020	10, 16-17: Tips on adding inventories	Simon Couderc
4	1/10/2021	• 1-2, 6, 13, 29, 30: Removed any mention of the 2 CVMS Help Desk emails. Added CVMS Help Desk Portal information.	Courtney Seward
5	1/14/2021	Updated navigation bar	Azalea Troche
6	1/22/2021	 Removed Account Inventory Slides Add reports tab on navigation bar Extra Doses Complete Vaccine Inventory 	Nicholas M. Rinz
7	1/28/2021	5-31: Updated screen shots to show new nav bar	Kristin Clark
8	2/8/2021	22-23: Updated Declare Vaccine Allocation Availability Section	Nicholas M. Rinz
9	2/14/2021	 7, 16-21, 23-25, 31-21: Updated screenshots and verbiage to Insufficient Quantities Updated Vaccine Allocation Availability section 	Kristin Clark
10	3/2/2021	22: Updated screenshots and added federal allocation slide	Nicholas M. Rinz
11	3/10/2021	36: added vaccine inventory comments	Nicholas M. Rinz
12	3/15/2021	22: Federal Allocation for non-FQHC or FEMA sites	Darrell Lee
13	3/18/2021	24-25: Update Change Allocation Status tips and default status	Nicholas M. Rinz
14	3/25/2021	42-46: Update federal Allocation for non-FQHC or FEMA sites	Nicholas M. Rinz
15	5/14/2021	 17, 18, 19, 33, 45: Updated screenshots and addition of SSC Remove reference to Usage (1st/2nd dose) 	Darrell E. Lee
16	6/28/2021	22: Note added for Pfizer 6-dose not being eligible for extra doses	Darrell E. Lee

